

## TRAINING WEEK 1 - MY MEMBERS TAB

The first week of Care Coordination Tool training will focus on the **My Members** tab. This tab is on the left hand side of your screen after you have successfully logged in.

After this self-guided training, you should be able to perform the following functions:

### 1.1 Navigate the My Members Main Table

### 1.2 Search for Members

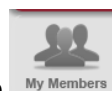
### 1.3 Sort Members by Disease Profile

### 1.4 Sort Members by Quality Indicators

### 1.5 Stratify Members by Risk / See Risk Chart

### 1.6 See Additional Member Information

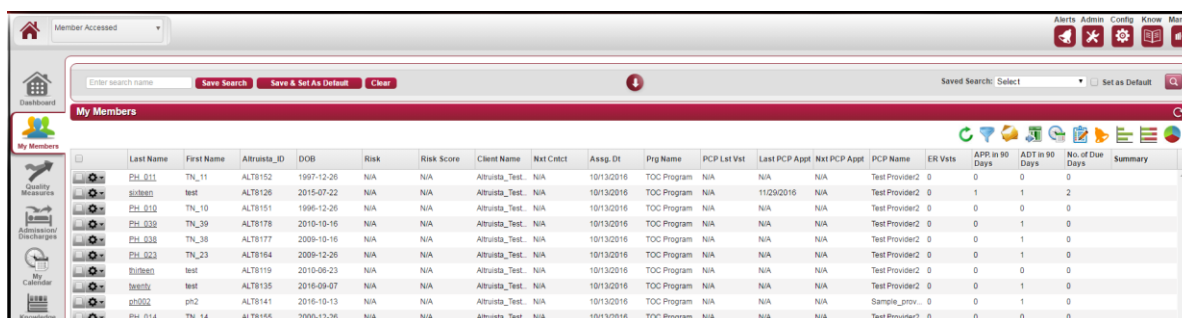
### 1.7 Export a Member List to Excel



To start this self-guided training, click the **My Members** tab on the left hand side of your screen after logging into the Care Coordination Tool.

### 1.1 NAVIGATE THE MY MEMBERS MAIN TABLE

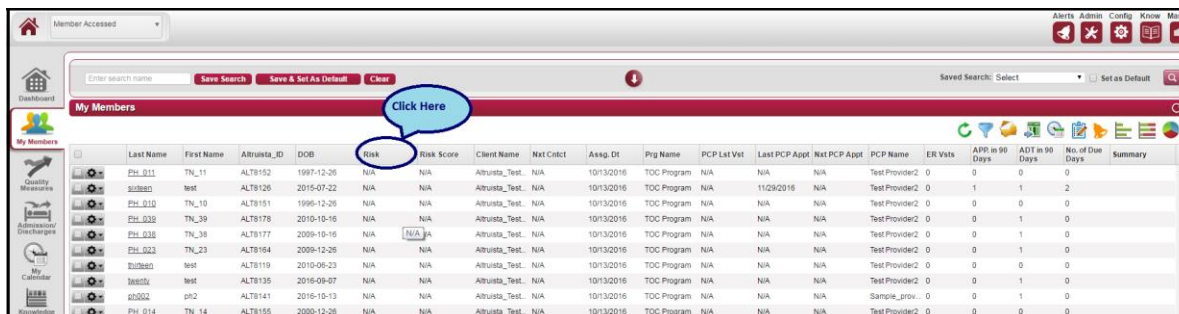
When you first click the **My Members** tab, a table will display the members assigned to the logged-in provider. Health Link providers will see all of their attributed members. Patient Centered Medical Home (PCMH) providers will see all of the TennCare members who have an assigned primary care provider (PCP) in their organization.



	Last Name	First Name	Altruista_ID	DOB	Risk	Risk Score	Client Name	Nxt Cntct	Assg. Dt	Prg Name	PCP List Vst	Last PCP Appt	Nxt PCP Appt	PCP Name	ER Vsts	APR in 90 Days	ADT in 90 Days	No. of Due Days	Summary
PH_011	TN_11	ALTS152	1997-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TCC Program	N/A	N/A	N/A	N/A	Test Provider2	0	0	0	0	
PH_010	TN_10	ALTS151	1996-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TCC Program	N/A	N/A	N/A	N/A	Test Provider2	0	1	1	2	
PH_010	TN_39	ALTS178	2010-10-16	N/A	N/A	Altruista_Test	N/A	10/13/2016	TCC Program	N/A	N/A	N/A	N/A	Test Provider2	0	0	1	0	
PH_010	TN_38	ALTS177	2009-10-16	N/A	N/A	Altruista_Test	N/A	10/13/2016	TCC Program	N/A	N/A	N/A	N/A	Test Provider2	0	0	1	0	
PH_010	TN_23	ALTS164	2009-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TCC Program	N/A	N/A	N/A	N/A	Test Provider2	0	0	1	0	
PH_010	test	ALTS119	2010-06-23	N/A	N/A	Altruista_Test	N/A	10/13/2016	TCC Program	N/A	N/A	N/A	N/A	Test Provider2	0	0	0	0	
PH_010	test	ALTS135	2016-09-07	N/A	N/A	Altruista_Test	N/A	10/13/2016	TCC Program	N/A	N/A	N/A	N/A	Test Provider2	0	0	1	0	
PH_010	ph2	ALTS141	2016-10-13	N/A	N/A	Altruista_Test	N/A	10/13/2016	TCC Program	N/A	N/A	N/A	N/A	Sample_prov	0	0	1	0	
PH_014	TN_14	ALTS155	2000-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TCC Program	N/A	N/A	N/A	N/A	Test Provider2	0	0	0	0	

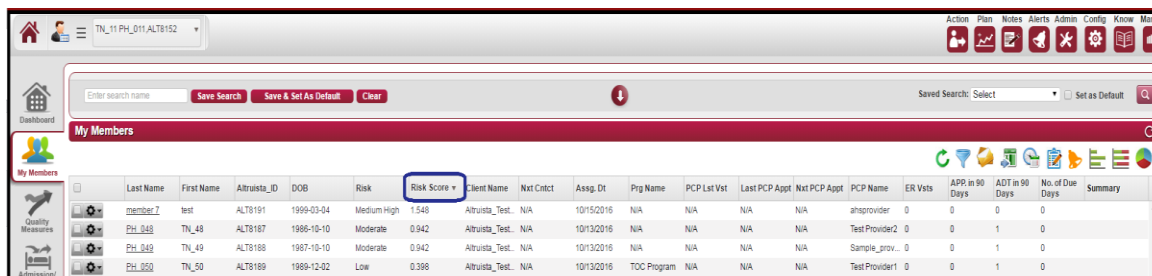
Every column in the above table can be sorted when you click the **column headers**.

For example, if you want to view all the members with risks levels arranged from high to low or vice- versa, click on the **Risk** column in the grid as shown below:



	Last Name	First Name	Altruista_ID	DOB	Risk	Risk Score	Client Name	Nxt Cntct	Assg. Dt	Prg Name	PCP Lst Vst	Last PCP Appt	Nxt PCP Appt	PCP Name	ER Vsts	APP in 90 Days	ADT in 90 Days	No. of Due Days	Summary
Phl_011	TN_11	test	ALT8152	1997-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	0	0	
Phl_010	TN_10	test	ALT8126	2016-07-22	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	11/29/2016	N/A	Test Provider2	0	1	1	2	
Phl_039	TN_39	test	ALT8151	1996-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	0	0	
Phl_038	TN_38	test	ALT8176	2010-10-16	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	1	0	
Phl_023	TN_23	test	ALT8177	2009-10-16	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	1	0	
Phl_022	TN_22	test	ALT8164	2009-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	1	0	
Phl_048	TN_48	test	ALT8119	2010-06-23	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	0	0	
Phl_049	TN_49	test	ALT8135	2016-09-07	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	1	0	
Phl_050	TN_50	test	ALT8141	2016-10-13	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Sample_prov...	0	0	1	0	
Phl_014	TN_14	test	ALT8155	2000-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	0	0	

Similarly, if you want to sort members by ascending/descending risk scores, click on the **Risk Score** column in the grid as shown below:



	Last Name	First Name	Altruista_ID	DOB	Risk	Risk Score	Client Name	Nxt Cntct	Assg. Dt	Prg Name	PCP Lst Vst	Last PCP Appt	Nxt PCP Appt	PCP Name	ER Vsts	APP in 90 Days	ADT in 90 Days	No. of Due Days	Summary
member 7	test	test	ALT8191	1999-03-04	Medium High	1.548	Altruista_Test	N/A	10/15/2016	N/A	N/A	N/A	N/A	ahsprovider	0	0	0	0	
Phl_048	TN_48	test	ALT8187	1986-10-10	Moderate	0.942	Altruista_Test	N/A	10/13/2016	N/A	N/A	N/A	N/A	Test Provider2	0	0	1	0	
Phl_049	TN_49	test	ALT8188	1997-10-10	Moderate	0.942	Altruista_Test	N/A	10/13/2016	N/A	N/A	N/A	N/A	Sample_prov...	0	0	1	0	
Phl_050	TN_50	test	ALT8189	1989-12-02	Low	0.398	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider1	0	0	1	0	

You can sort in alphabetical order by member **First Name** or **Last Name**, sort members in the order of **Assigned Date**, sort members based on the number of **ER Visits** and so on.

The user can select required columns from **Select** drop-down and click **Show** to display the selected columns in the table. You can also set the selected filter as a default view by selecting the check box.



**My Members**



Filter: Select Show Save

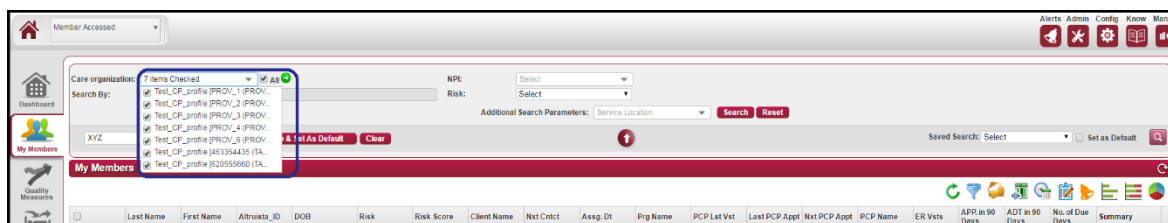
## 1.2 SEARCH FOR MEMBERS


1. Click the  icon to expand the Global search panel.

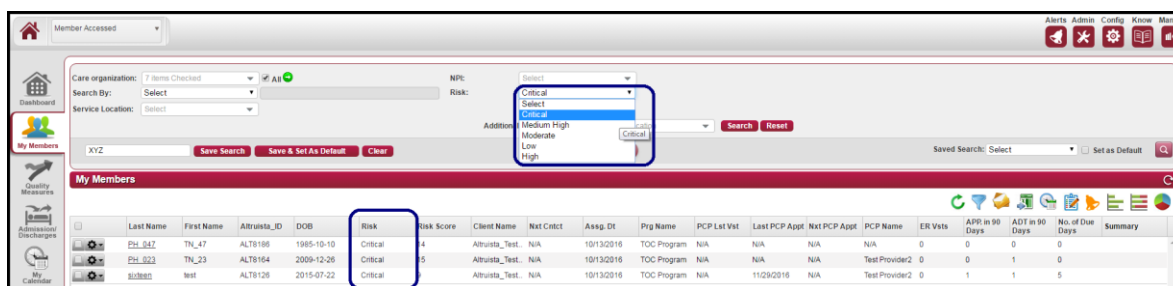
You can search using the following search fields:

2. Select **Care organization**, **Program**, or **Program Status** from the respective drop-downs.
  - a. Note: **Care organization** refers to the members' Managed Care Organization (MCO). Additionally, **Program Status** is only pertinent for Tennessee Health Link. PCMH providers should not sort by **Program Status**.
3. Enter the **Search name** and click **Save Search** to save the search parameters given to be used later.
4. Searched names that are saved appear as drop-down values in the **Saved Search** field.

- If you want to select all Care organizations (MCOs) at one time, click on the All option checkbox  next to the **Care organization** drop down. Once the option is checked it changes to .

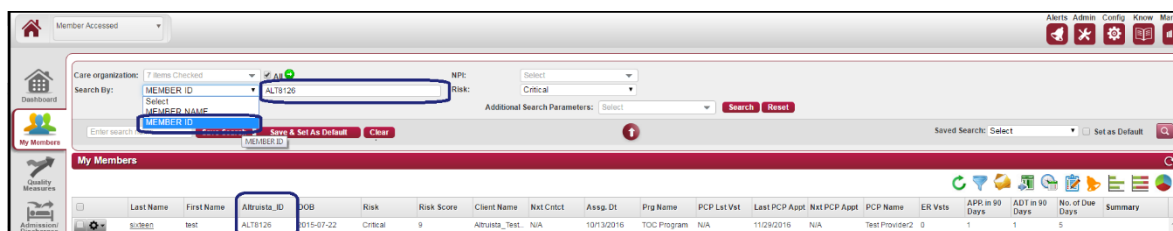


6. If you click **Save and Set as Default**, the search parameters given will be saved and also will be displayed by default whenever the user logs in.
7. If you want to search members by **NPI** and **Service Location**, select a practice Tax ID from the **Care organization** drop down and click the green arrow icon  to load values in the **NPI** and **Service Location** drop downs.
8. Select an NPI or service location from the drop-down and click search to filter members.
9. To search members by risk levels, select any risk category such as **Low**, **Moderate**, **Medium**, **High**, **High** and **Critical** from the **Risk** drop-down and click search.



	Last Name	First Name	Altruista_ID	DOB	Risk	Risk Score	Client Name	Next Crict	Assg Dt	Prg Name	PCP Lst Vst	Last PCP Appt	Nxt PCP Appt	PCP Name	ER Vets	APR in 90 Days	ADT in 90 Days	No. of Due Days	Summary
	Phl 542	TN_47	ALT8186	1985-10-10	Critical	4	Altruista_Test	N/A	10/13/2016	TCC Program	N/A	N/A	N/A	N/A	0	0	0	0	
	Phl 523	TN_23	ALT8164	2009-12-26	Critical	5	Altruista_Test	N/A	10/13/2016	TCC Program	N/A	N/A	N/A	Test Provider2	0	0	1	0	
	Sub800	Test	ALT8126	2015-07-22	Critical		Altruista_Test	N/A	10/13/2016	TCC Program	N/A	11/29/2016	N/A	Test Provider2	0	1	1	5	

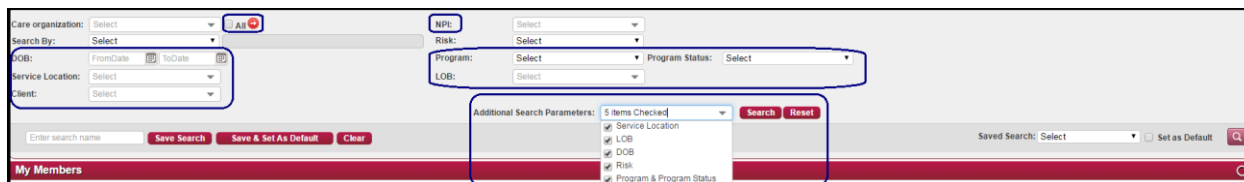
10. In the **Search By** drop down you can select **Member Name** or **Member ID** from the list and enter the relevant search text in the text box to filter. Note: The **Member ID** is the Altruista ID and not the Medicaid or TennCare ID.



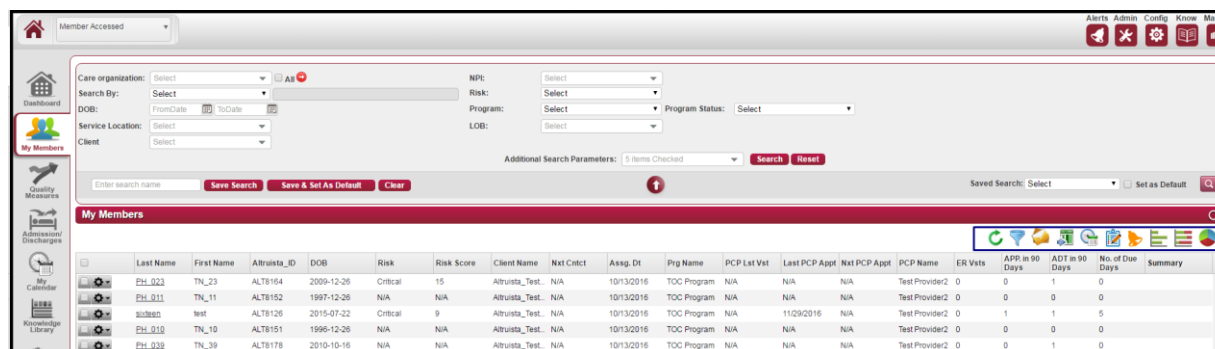
	Last Name	First Name	Altruista_ID	DOB	Risk	Risk Score	Client Name	Next Crict	Assg Dt	Prg Name	PCP Lst Vst	Last PCP Appt	Nxt PCP Appt	PCP Name	ER Vets	APR in 90 Days	ADT in 90 Days	No. of Due Days	Summary
	Sub800	Test	ALT8126	2015-07-22	Critical	9	Altruista_Test	N/A	10/13/2016	TCC Program	N/A	11/29/2016	N/A	Test Provider2	0	1	1	5	

11. To search members using the **Additional Search Parameters** you can select one or more of these parameters from the drop down to use as a search criteria. The Additional Search Parameters drop down list includes **Service Location**, **LOB**, **DOB**, **Risk**, and **Program & Program Status**.
  - a. **LOB** (line of business) will show Medicaid for all members.



- b. **Program** will show if the selected member is in PCMH, Health Link, or both. All members will eventually be in the program titled **“TOC”** which stands for **Total Cost of Care**.
- c. When a parameter is selected in the **Additional Search Parameters** drop down list, the selected parameter appears as a new drop down list in the search panel. For **DOB** search criteria, **From** and **To** dates can be given to filter members with a date of birth within a given time frame.




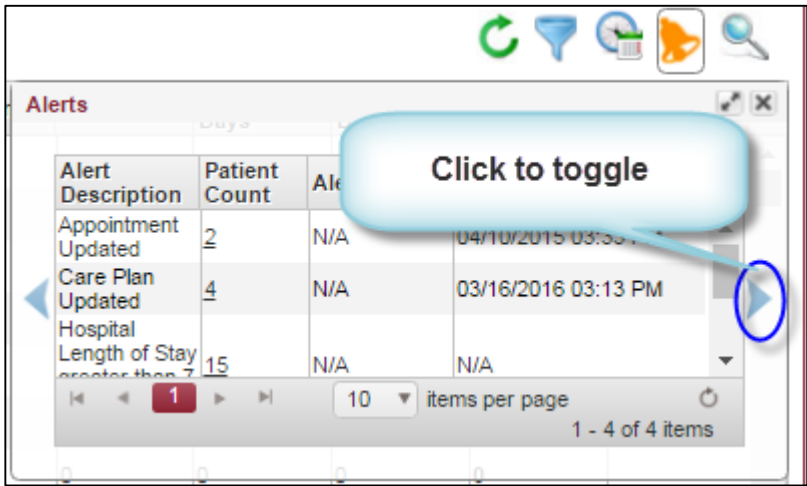

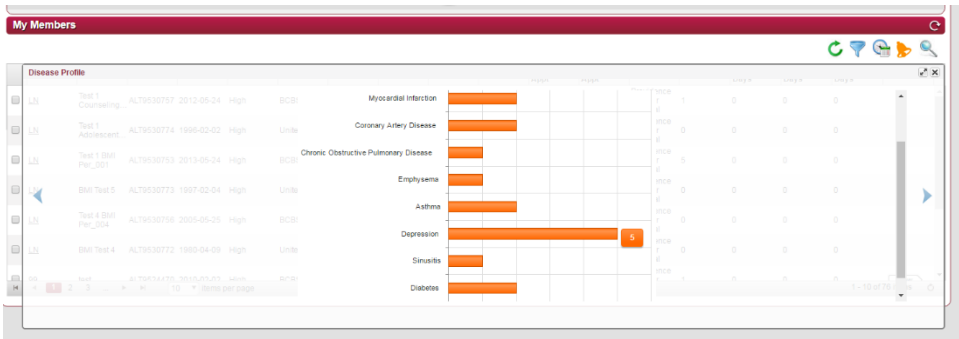


The **My Members Main Table** also has a few icons, seen at the top right of the page. The table below describes the functionality of each icon and Sections 1.3, 1.4 and 1.5 of this training guide, walk you through the additional functions of the alerts icon in more detail.



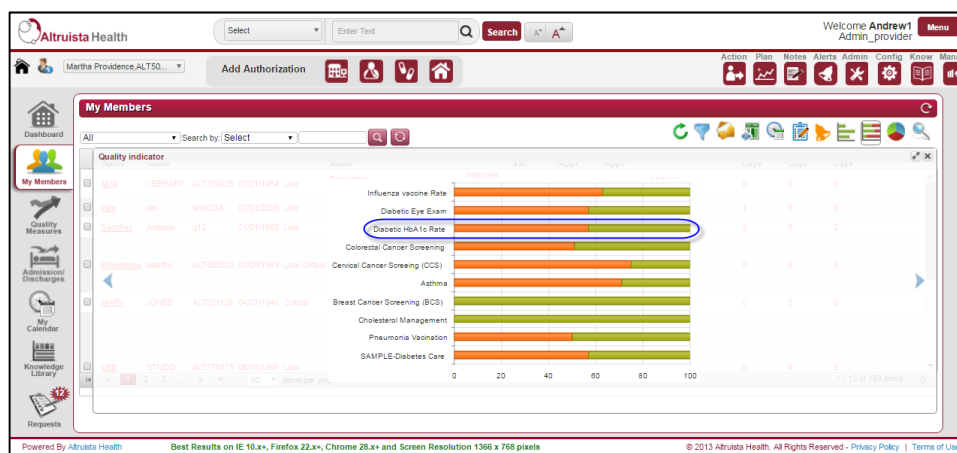
Last Name	First Name	Altruista_ID	DOB	Risk	Risk Score	Client Name	Next Cntct	Assg. Dt	Prg Name	PCP 1st Vst	Last PCP Appt	Next PCP Appt	PCP Name	ER Vsts	APP in 90 Days	ADT in 90 Days	No. of Days	Summary
Eht_023	TN_23	ALT8164	2009-12-26	Critical	15	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	1	0	
Eht_011	TN_11	ALT8152	1997-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	0	0	
slidest	test	ALT8126	2015-07-22	Critical	9	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	11/29/2016	N/A	Test Provider2	0	1	1	5	
Eht_010	TN_10	ALT8151	1996-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	0	0	
Eht_038	TN_38	ALT8178	2010-10-16	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	1	0	

Icon	Functionality
	<b>Refresh:</b> Removes any filters applied and refreshes the list of Members
	<b>Filters Applied:</b> Displays the criteria that has been used to filter Members such as, Diseases, Quality Indicators, Risk Categories, and Opportunities

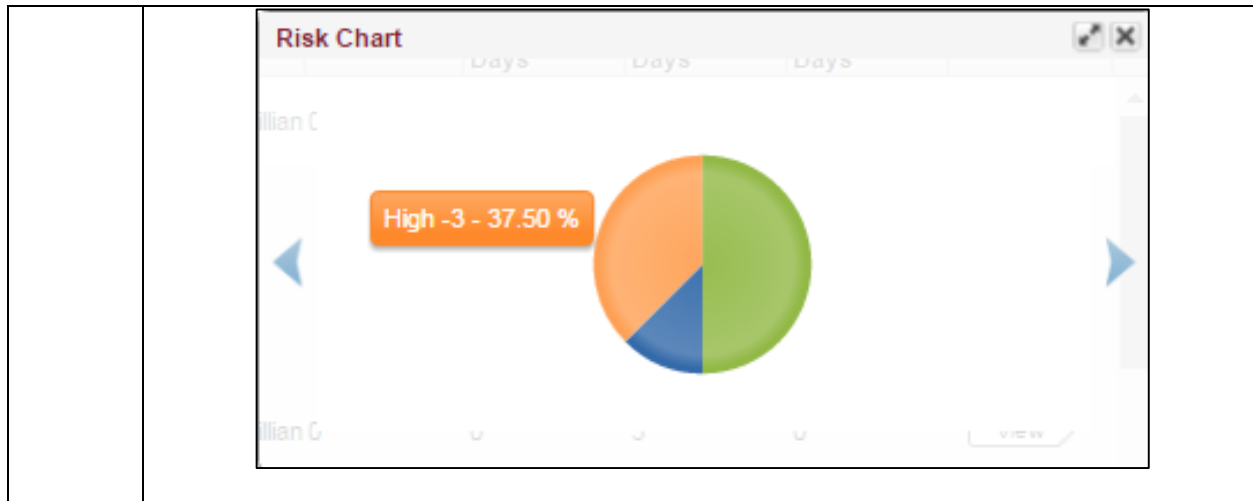
	<p><b>Scheduler.</b> Allows scheduling an activity for a single member or multiple members. Multi-select members from the table and click the Scheduler icon. The <b>Add Activity</b> pop up window should appear. Select the Activity type, time and date and add the Activity.</p>
	<p><b>Export to Excel:</b> Allows you to export all the members records from <b>My Members</b> table for all or selected columns to Excel.</p>
	<p><b>Alerts.</b> Displays alerts generated for members from different sources along with the member count. Click the arrow to the right to view Disease Profile, Quality Indicators and Risk Categories of the members.</p> 
	<p><b>Disease Profile.</b> Bar graph displays the list of conditions the members have along with the count. Clicking on the count against a disease bar refreshes the My Members list and loads the member data specific to the condition selected.</p> 




**Quality Indicators.** Displays the quality indicators (mostly HEDIS) in **Numerator** (orange bar) and **Denominator** (green bar). **Denominator** indicates the total count of eligible members for the quality indicator. **Numerator** indicates the members who met the criteria. For example, with HbA1c, **Denominator** indicates the count of members who are eligible to take an HbA1c test. The **Numerator** indicates the members who have had an HbA1c test done. So when you click on the orange bar (Numerator), the My Members page refreshes and displays the list of Members who have had an HbA1c test performed. Clicking on the Green bar (Denominator) will refresh the My Members list and displays the list of Members who have not had their HbA1c test performed. Therefore, you can select all these members and click **Scheduler** to add an activity for these members.

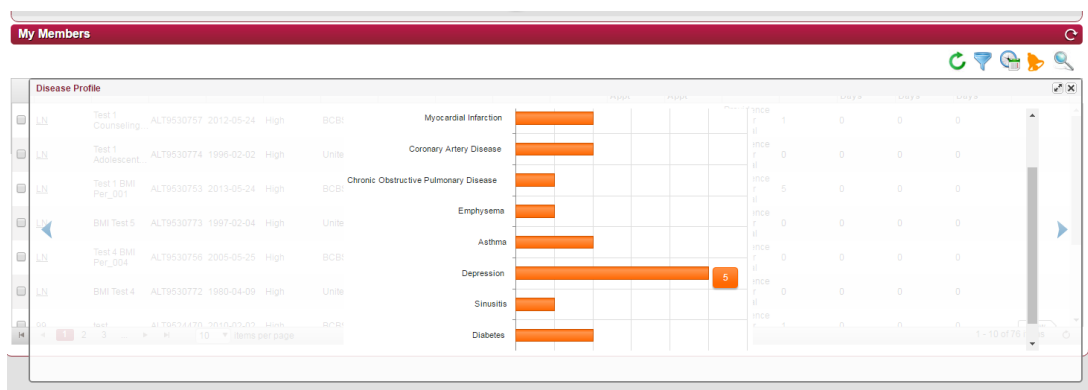


**Risk Chart.** You can view members according to their risk categories by clicking **Risk Chart**. The Risk chart view displays the risks (Critical, High, Medium\_High, Medium, and Low depending on the configurations) in Patient number and Percentages in a pie chart. Click a **Risk Category** to view the members in that category in the My Members page.



### 1.3 SORT MEMBERS BY DISEASE PROFILE





1. Click  and toggle to view the Disease Profile.
2. In **Disease Profile**, hover over the appropriate condition (for example: Diabetes). System displays count of members.








3. Click the **Condition bar**. List of members with that condition (Diabetes) is displayed in My Members page.



**My Members**












	Last Name	First Name	Altruista ID	DOB	Risk	Health Plan	Nxt Cntct	Assg. Dt	Prg Name	PCP Lst Vst	Last PCP Appt	Nxt PCP Appt	PCP Name	ER Vsts	APP. in 90 Days	ADT in 90 Days	No. of Due Days	Summary
	LN	Test 1 Mening...	ALT953...	2005-04-04	Low	United TN	N/A	05/27/2...	TOC Program	N/A	N/A	N/A	Provide... St Peter Hospital	0	0	0	0	
	TESTTEN	ANSON	ALT952...	1974-04-25	Low	Tenn_care	N/A	05/11/2...	TOC Program, PCMH, TOC Program, Tencare...	N/A	N/A	N/A	Provide... St Peter Hospital	0	0	2	0	
	99	test	ALT952...	2010-02-02	Low	BCBS TN	N/A	07/08/2...	TOC Program, Tencare...	N/A	08/05/2...	N/A	Provide... St Peter Hospital	0	1	1	24	<a href="#">View</a>
	LN	Test 1 BMI Per_001	ALT953...	2013-05-24	Low	BCBS TN	N/A	06/05/2...	TOC Program, Tencare...	N/A	N/A	N/A	Provide... St Peter Hospital	0	0	0	0	<a href="#">View</a>
	LN	Test 3 BMI	ALT953...	2000-05-10	Low	BCBS TN	N/A	05/26/2...	TOC Program	N/A	N/A	N/A	Provide... St Peter Hospital	0	0	0	0	<a href="#">View</a>

1 - 10 of 77 items

4. The name of the condition is displayed when you hover on the filter icon .


**My Members**

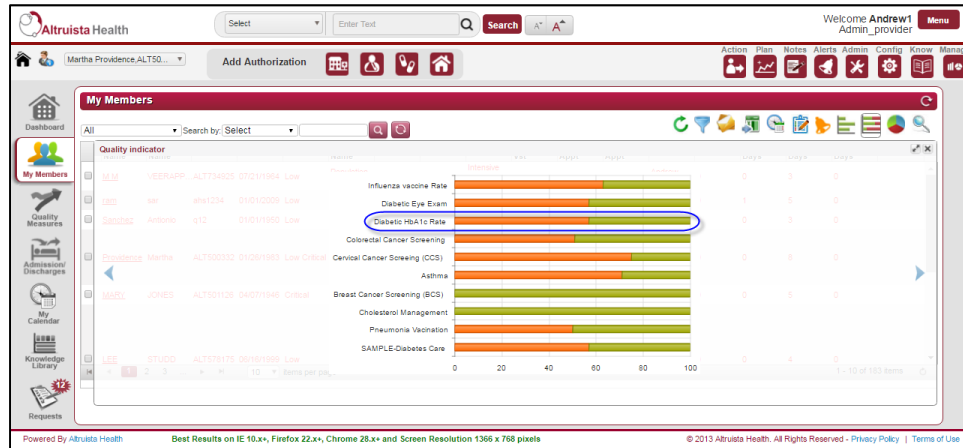





	Last Name	First Name	Altruista ID	DOB	Risk	Health Plan	Nxt Cntct	Assg. Dt	Prg Name	PCP Lst Vst	Last PCP Appt	Nxt PCP Appt	PCP Name	ER Vsts	APP. in 90 Days	ADT in 90 Days	No. of Due Days	Summary
	99	test	ALT9524...	2010-02-02	Low	BCBS TN	N/A	07/08/2016	PCMH, TOC Program, Tencare...	N/A	08/05/2016	N/A	Provide... St Peter Hospital	0	1	1	24	<a href="#">View</a>
	LN	Test 5 Meningo...	ALT9530...	2000-06-06	Low	United TN	N/A	05/27/2016	TOC Program	N/A	N/A	N/A	Provide... St Peter Hospital	0	0	0	0	

1 - 2 of 2 items


## 1.4 SORT MEMBERS BY QUALITY INDICATORS

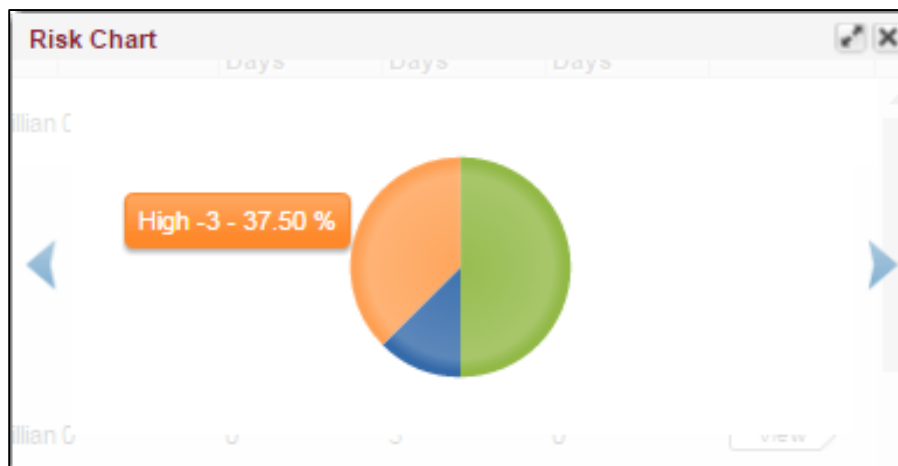
- Click  and toggle to view the Quality Indicators. You may want to expand the window using the double arrow button in the top right corner to improve readability. The **Quality Indicators** view displays the list of quality indicators used to manage members' health conditions. The **orange** bar shows the count of members who met the criteria of the **Quality Measure** (Numerator) and the **green** bar shows the count of members who didn't met the criteria.
- In **Quality Indicators** popup window, hover over the appropriate Quality Indicator. For HbA1C Testing, select **Diabetic HbA1C Testing**.



3. Hovering over the **Orange bar** displays the Numerator and Denominator numbers. Denominator indicates the total eligible members who qualify for the criteria and Numerator (**Orange bar**) indicates the actual count of members who met the criteria for a particular Quality Indicator. **Green bar** shows the gaps in care.
4. Click the **green bar** to get the list of members who have a gap in care for that quality measure.

## 1.5 STRATIFY BY RISK / SEE RISK CHART

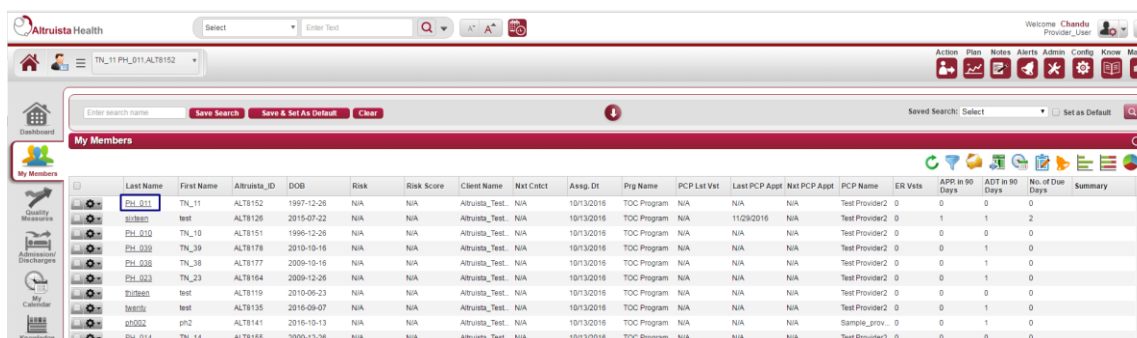
1. In the **My Members Main Table**, double-click **Risk** column header to sort in order of risk.
2. You can also click  and toggle to view **Risk Chart**. A pie diagram showing proportion of members in different risk levels will appear.



3. Hover your mouse over each section of the pie chart and then select the risk level you would like to filter by.
4. A list of members within that risk level is displayed in the My Members page.

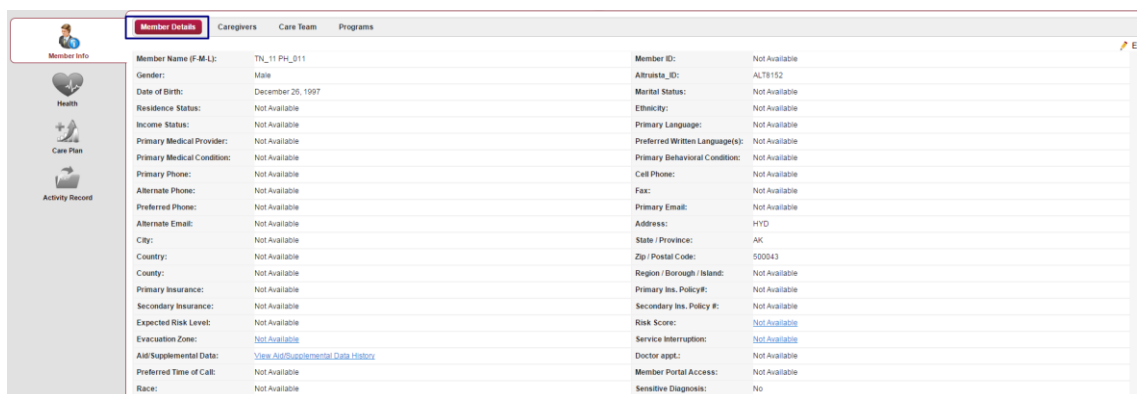
## 1.6 VIEW MEMBER INFORMATION

1. In the **My Members Main Table**, click on the **Member Last Name** for any given member to access that member's 'Member Summary' panel.



	Last Name	First Name	Altruista_ID	DOB	Risk	Risk Score	Client Name	Next Cntct	Assg. Dt	Prg Name	PCP Lst Vst	Last PCP Appt	Nxt PCP Appt	PCP Name	ER Vsts	ADT in 90 Days	ADT in 30 Days	No. of Due Days	Summary
	TH_11	PH_011	ALTR152	1997-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	0	0	
	test		ALTR126	2015-07-22	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	11/29/2016	N/A	Test Provider2	0	1	1	2	
	PH_010	TH_10	ALTR151	1996-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	0	0	
	PH_030	TH_39	ALTR178	2010-10-16	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	1	0	
	PH_030	TH_38	ALTR177	2009-10-16	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	1	0	
	PH_030	TH_23	ALTR164	2009-10-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	1	0	
	test		ALTR110	2010-06-23	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	0	0	
	PH_030	test	ALTR136	2016-09-07	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	1	0	
	PH_030	PH2	ALTR141	2016-10-13	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Sample_prov.	0	0	1	0	
	PH_030	TH_14	ALTR155	2000-12-26	N/A	N/A	Altruista_Test	N/A	10/13/2016	TOC Program	N/A	N/A	N/A	Test Provider2	0	0	0	0	

2. This will take you to that member's **Member Summary**. Here, you can view **Member Details**, such as contact information and preferred language of communication, among other details.
3. In addition, you will see three separate tabs (Caregivers, Care Team, and Programs) with more information on that member.
4. The member's risk score and risk level are displayed in the top right corner of the screen.




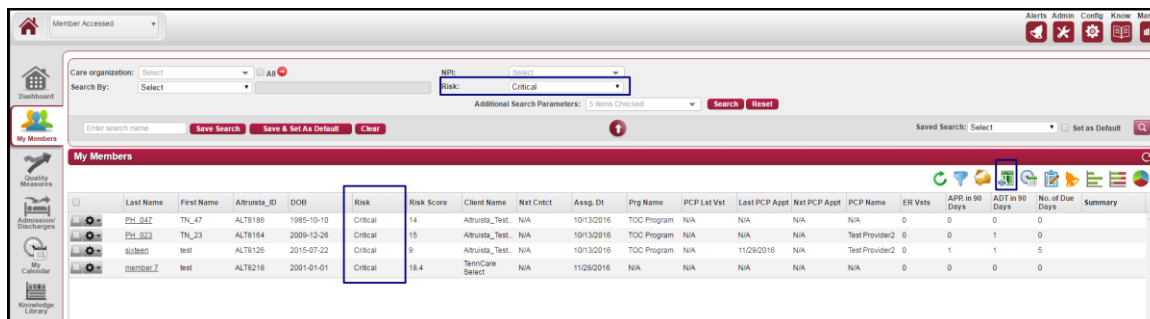
Member Details		Caregivers	Care Team	Programs
Member Name (F-M-L):	TH_11 PH_011			
Gender:	Male			
Date of Birth:	December 26, 1997			
Residence Status:	Not Available			
Income Status:	Not Available			
Primary Medical Provider:	Not Available			
Primary Medical Condition:	Not Available			
Primary Phone:	Not Available			
Alternate Phone:	Not Available			
Preferred Phone:	Not Available			
Alternate Email:	Not Available			
City:	Not Available			
Country:	Not Available			
County:	Not Available			
Primary Insurance:	Not Available			
Secondary Insurance:	Not Available			
Expected Risk Level:	Not Available			
Evacuation Zone:	Not Available			
Aid/Supplemental Data:	<a href="#">View Aid/Supplemental Data History</a>			
Preferred Time of Call:	Not Available			
Race:	Not Available			
Member ID:	Not Available			
Altruista_ID:	ALTR152			
Marital Status:	Not Available			
Ethnicity:	Not Available			
Primary Language:	Not Available			
Preferred Written Language(s):	Not Available			
Primary Behavioral Condition:	Not Available			
Cell Phone:	Not Available			
Fax:	Not Available			
Primary Email:	Not Available			
Address:	HYD			
State / Province:	AK			
Zip / Postal Code:	500043			
Region / Borough / Island:	Not Available			
Primary Ins. Policy#:	Not Available			
Secondary Ins. Policy #:	Not Available			
Risk Score:	Not Available			
Service Interruption:	Not Available			
Doctor appt.:	Not Available			
Member Portal Access:	Not Available			
Sensitive Diagnosis:	No			

## 1.7 ACTIVITY: EXPORT A MEMBER LIST TO EXCEL

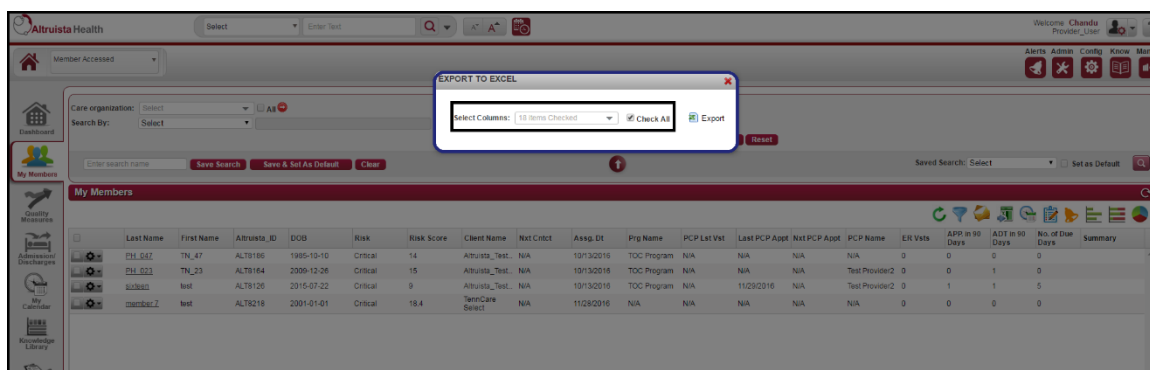
This practice activity shows you how to export a member list to Excel. Using the following steps, you will be exporting a list of members that are sorted by Risk Level.

1. Filter Members in **My Members** Main Table based on **Risk Levels** and export the records

by clicking on the Export to Excel icon  as show below. Note: Please make sure your web browser allows popups, as this is part of the design to open Excel.



2. Export all the Member records from the **My Members** main table by clicking the Check All box in the Export to Excel window.



3. You can select specific columns from the **Select Columns** drop down and export the Members' records to Excel:

